DOCUMENT RESUME

ED 141 542 08 CE 011 384

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TITLE Collecting Framework Production and Training Information. Self-Paced Instructional Module. Module Number IV-A.
INSTITUTION Mississippi Research and Curriculum Unit for Vocational and Technical Education, State College.; Mississippi State Dept. of Education, Jackson. Div. of Vocational and Technical Education.
SPONS AGENCY Office of Education (DHEW), Washington, D.C.
PUB DATE Dec 76
GRANT G007500439
NOTE 28p.; For related documents see CE 011 375-407
AVAILABLE FROM Coordinator of Industry Services, Research and Curriculum Unit for Vocational-Technical Education, College of Education, Mississippi State, Mississippi 39762 ($50.00 for the set of 33)

EDRS PRICE MF-$0.83 HC-$2.06 Plus Postage.
DESCRIPTORS Adult Vocational Education; *Data Collection; Educational Needs; Guidelines; *Industrial Education; Industry; *Information Needs; *Leadership Training; Learning Activities; Learning Modules; Needs Assessment; *Program Planning; Services; State Programs
IDENTIFIERS *Industry Services

ABSTRACT

One of 33 self-paced industry services leadership development (ISLD) modules, this module contains three sequential learning activities on collecting basic production and training information relative to the industry for which training services will be provided. (The industry services program for which these materials were developed would involve provision of job training by public agencies for new or expanding private industry.) The first learning activity is designed to provide the learner (industry services leader) with the needed background information on collecting necessary data during initial meetings with plant personnel. The second activity gives opportunity to apply the information in a practice situation, and the final check-out activity allows the learner to collect framework production and training information in a real work situation, e.g., when he is employed or serving as an intern learner. Feedback devices (a learner self-test, worksheet, and performance checklist) are included for use by the learner and instructor/supervisor to assess progress. Case study information, a manpower needs projection worksheet, and production and training questionnaire are included for guidance in performing the objectives. (Two of the other modules also deal with the process of identifying training needs: Selecting types of training programs, and preparing a budget for an industry services project.) (JT)

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MODULE NUMBER IV-A

COLLECTING FRAMEWORK PRODUCTION AND TRAINING INFORMATION

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SELF-PACED INSTRUCTIONAL MODULE

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Published by the:

Division of Vocational-Technical Education
Mississippi State Department of Education
Jackson, Mississippi

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This publication was prepared pursuant to a grant with the Office of Education, U.S. Department of Health, Education and Welfare. Contractors undertaking such projects under government sponsorship are encouraged to express freely their judgment in professional and technical matters. Points of view or opinions do not, therefore, necessarily represent official Office of Education position or policy.

Grant Number: G007500439

December, 1976

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INSTRUCTIONAL PROCEDURE

This module contains two sequential learning activities and a final check-out activity. A brief overview precedes each learning activity and the final check-out activity. Each learning activity and the final check-out activity provide learning experiences to help you accomplish the objectives. Feedback devices (learner self-test, worksheet, and performance checklist) are provided to help you determine when each objective has been accomplished.

The first learning activity is designed to provide you with the needed **background information**. The second learning activity is designed to give you an opportunity to apply that information in a **practice** situation. The **Check-Out Activity** is the final learning activity. It is designed to allow you to collect framework production and training information in a real work situation, such as when you are employed or when you are serving as an intern learner. The **Performance Checklist** (Appendix A) is used by the learner and the instructor/supervisor to assess progress. The checklist is applicable for both practice performance and performance in the real work situation.

After reading the **Objectives** and the **Introduction** on pages 2 and 3, you should be able to determine how much of this module you will need to complete before the **Check-Out Activity**.

* If you already have the necessary **background information** required for collecting framework production and training information, you may not need to complete **Learning Activity I**, p. 4 .
* If you already have had practice in collecting framework production and training information, you may not need to complete **Learning Activity II**, p. 19 .
* Instead, with the approval of your instructor or supervisor, you may choose to proceed directly to the **Check-Out Activity**, p. 21 , and collect production and training information when you have access to a **real work situation**.

Your instructor or supervisor may be contacted if you have any difficulty with directions, or in assessing your progress at any time.

SUPPLEMENTARY TEACHING/LEARNING AIDS

An effort has been made to make this module as self-contained as possible. The information contained in the module should be sufficient to develop "entry-level" knowledge and skills. However, much has been written on this topic. The advanced learner may wish to attain higher levels of knowledge and skills.

A list of resources which supplement those contained within the module follows. Check with your instructor or supervisor (1) to determine the availability and the location of these resources, and (2) to get assistance in setting up additional learning activities.

There are no prerequisites for completing this module. However, the module may be used in conjunction with module number VIII-A, **Conducting a Task Analysis**, and module number III-A, **Developing Training Agreements**.

Learning Activity I

* Rummler, Geary. "How to Determine What Problems Can and Can't be Resolved (Front-end analysis)." **Training and Development Journal**, August, 1976, pp. 18-21.

Learning Activity II

* (None)

Check-Out Activity

* Industry manufacturing engineers
* Industry production superintendents and supervisors

OBJECTIVES

I. After completing the required reading, take the learner self-test to demonstrate you have attained the knowledge of collecting framework production and training information. You should complete all items correctly. **(Learning Activity I)**

II. After analyzing the performance instructions, complete all the designated experiences in collecting framework production and training information in a practice situation. Your work must conform to the worksheets and checklist provided in the appendices. **(Learning Activity II)**

III. In an actual work situation, collect framework production and training information. Satisfactory performance will be realized when all items on the performance checklist (Appendix A) are rated "yes." **(Check-Out Activity)**

COLLECTING FRAMEWORK PRODUCTION AND TRAINING INFORMATION

INTRODUCTION

Prior to conducting a task analysis, the industry services leader must become acquainted with basic production and training information relative to the industry. In all probability, this information is not documented, and the industry services leader must collect it from plant personnel.

The information required usually goes beyond a basic task analysis, and includes such items as time required for training, the situations under which tasks are performed, feasible training methods required, and resources needed for training. This information is collected during initial meetings with plant personnel, and serves as a framework for decision-making throughout the project. Confidentiality in using any company information must be maintained.

This unit will focus on collecting information which can later be incorporated into training agreements, and other training plans.

LEARNING ACTIVITY I: INFORMATION

You should study the information presented on the following pages. You may wish to read the journal article cited in the list of supplementary teaching/learning aids. After reading these materials, you will demonstrate knowledge of collecting framework production and training information by completing the **Learner Self-Test**, p. 11 . You will be evaluating your knowledge by comparing your self-test answers with the **Answers to Self-Test**, p. 15 .

I. TERMS UNIQUE TO MODULE

A. **Aptitude**. Quickness to learn and perform tasks.

B. **Competency level/performance level**. Desired skills which workers or prospective workers must possess.

C. **Educational level**. Desired grade level achievement in grade school, high school, or college.

D. **Framework information**. Basic information needed for decision-making and planning.

E. **Job description**. A general statement indicating the duties, responsibilities, working conditions, and training requirements for a particular job.

F. **Manpower requirements**. The number of trained workers required for an adequate industry work force. Also includes detailed descriptions of basic competencies (performance levels) and personal characteristics desired.

G. **Personal characteristics**. Distinctive traits, qualities, or behaviors which contribute to job success.

H. **Prerequisite skill**. A basic task which must be mastered prior to performing other tasks, such as reading a micrometer.

I. **Production information**. Facts and data related to industry planning, organization, and management of industry manufacturing and quality-control activities.

J. **Task analysis**. The process of identifying the job content in industry, including task lists, procedures for performing tasks, information related to tasks, quality control standards, and equipment, tools, and supplies needed for task performance.

K. **Training information.** Facts and data related to the planning, organization, and management of instructional programs for industry.

II. DIFFERENCES BETWEEN A TASK ANALYSIS AND FRAMEWORK PRODUCTION AND TRAINING INFORMATION

A. **Type of information.** Framework information provides a general, over-all picture of the total operating procedures; duties and tasks performed; materials and supplies used; tools and equipment needed; a general description of the knowledge and skills required to manufacture a product; and projections of the resources which will be required for training. Framework production and training information includes job classifications, company information, rationale for training, and descriptions of training needs. A task analysis, on the other hand, provides specific information and data concerning the equipment, materials, knowledge, and skills necessary to perform specific tasks.

B. **Number of persons interviewed.** In order to obtain a comprehensive picture of the total production process, as many persons are interviewed as necessary to secure the framework production and training information. Since a task analysis focuses on specific production tasks, only the individuals familiar with the tasks, (e.g., the production engineer, operator, and supervisor) are interviewed.

C. **Time.** Because of the general nature of the questions, the collection of framework information can usually be completed within a relatively short period of time. A task analysis requires considerably more time because each task must be observed, charted, written and/or recorded descriptions made of the specific tasks. Input from operators and supervisors must be recorded.

III. PURPOSES OF FRAMEWORK INFORMATION

A. **To determine the extent to which training can be provided by the educational agency**

B. **To determine the nature and kind of company resources (instructors, equipment, and graphic arts expertise) which can be provided for the training program**

C. **To determine the resources needed by the state and local educational agency in providing training services to industry**

D. **To determine the characteristics required for prospective employees**

E. **To provide a blueprint for planning the training program**

IV. TYPES OF INTERVIEW WORKSHEETS WHICH CAN BE USED IN COLLECTING FRAMEWORK INFORMATION

A. **Close-ended (structured) questionnaires.** This form of questionnaire contains the questions and alternative answers. The answers provided should exhaust all possible responses. This type questionnaire is rather difficult to develop due to varied industry needs.

Example: What mode of transportation do you normally use to ship finished products to the buyer? Check one or more.

( ) air freight
( ) railroad freight
( ) ship freight
( ) truck freight
( ) others _____

B. **Open-ended (unstructured) questionnaires.** Questionnaires written in this form do not provide alternative answers to the questions. The respondent is not restricted to prepared answers. The answer to each question can be fully and completely provided.

Example: How are finished products shipped from factory to retailer?

Answer _____

V. PRODUCTION AND TRAINING INFORMATION NEEDED

A. **Company history**

B. **Non-confidential company product information**

C. **Expansion or new site plans**

D. **Organization of plant, and production flow charts**

E. **Job descriptions**

F. **Overview of production processes**

G. **Tools, equipment, and supplies needed for training**

H. **Resources available for program**

I. **The number of job categories involved and types of equipment required**

1. Machine operators
2. Welders
3. Assemblers
4. Quality-control specialists
5. Supervisors
6. Support personnel
7. Others

J. **The number of workers needed in each job category**

1. Technical/supervisory
2. Skilled
3. Semiskilled
4. Production/non-production
5. Support personnel
   a. Maintenance
   b. Secretarial and related
6. Other

K. **Manpower availability in the local area**

1. Attitude of workers in the area toward the designated industry
2. Training and trainability of local workers
3. Productivity of workers in the area
4. Recruiting plans of other industries
5. Number of available skilled workers in area

L. **The personal characteristics required of prospective employees**

1. Cooperative spirit
2. Loyalty to company
3. Commitment to job
4. Other

M. **The educational level required of prospective employees**

N. **The levels of competencies required of prospective employees**

O. Prerequisite skills required of prospective employees

P. Personal needs of prospective employees

1. Security
2. Comfort
3. Stability of job
4. Challenge of job

VI. AGENCIES REPRESENTED WHEN INFORMATION IS COLLECTED

A. Vocational-technical education complex

B. State employment service

C. Client company

D. State division of vocational-technical education

E. State research and curriculum unit for vocational-technical education

F. State research and development center

G. Local health department (e.g., if physical exams are necessary)

VII. EXAMPLES OF CHARACTERISTICS INDUSTRIES REQUIRE OF THEIR EMPLOYEES

A. A minimum of a high school diploma or its equivalent

B. Manual dexterity (e.g., ability to work at rapid pace with hands)

C. Mechanical aptitude

D. Physical strength (e.g., strength to move jigs, fixtures, and tools)

E. Good eyesight (e.g., not color blind)

F. Ability to work alone and/or in darkness (e.g., dark room tasks in graphic arts industries)

G. Ability to work from heights and from peculiar positions (e.g., assembly of large industrial equipment)

H. Ability to work in places with high noise levels

I. Interest in job opportunities available (e.g., engaging in shift work)

J. Cooperativeness

K. Ability to meet health requirements according to job

VIII. EXAMPLES OF PREREQUISITE SKILLS

A. **Basic reading, writing, and mathematical skills**

B. **Use of basic tools and equipment**

C. **Comprehension of industry economics (especially relevant to prospective supervisors)**

D. **Comprehension of interrelationships among workers, supervisors, engineers, and managers**

IX. EXAMPLES OF LEVELS OF COMPETENCIES (SKILLS) REQUIRED OF WORKERS

A. **Supervisors (example levels of competencies shown in quotations)**

1. Counseling workers on production efficiency. "The counseling must be performed in a manner that will not offend the employee."
2. Demonstrate the use of equipment. "The instructions must be clear and accurate, with the worker being able to operate the equipment without injury or equipment damage."

B. **Quality-control specialists**

Inspect shaft diameters. "One of 50 parts must be checked, with no errors occurring in acceptance or reject records."

C. **Skilled workers**

1. Assemble an armature stack. "The completed stack must not contain twisted or bent laminations."
2. Finish turn a shaft. "No streaks or rough edges caused by the cutting tool must appear on the finished shaft."

*Continue this learning activity by taking the **Learner Self-Test** which follows.

LEARNER SELF-TEST

This is a checkpoint knowledge test needed before proceeding to the task of collecting framework production and training information. Follow the instructions provided with each item. Check your answers with the **Answers to Self-Test** which follow. If you fail to complete all items correctly, you may wish to refer back to the module information.

1. Which one of the following is most likely a requirement for collecting framework production and training information? Circle the correct answer.
   a. Interview each worker in each department.
   b. Videotape task procedures.
   c. Conduct brief interviews with as many plant personnel as necessary to collect information.
   d. Obtain detailed task procedures from supervisors.
2. Which one of the following is **not** likely covered in the framework production information? Circle the correct answer.
   a. Description of company products
   b. Detailed instructional knowledge associated with tasks
   c. New plant organization charts
   d. Resources available for project
3. Name five categories of production and training information needed.
   a.
   b.
   c.
   d.
   e.
4. Identify from the following list, four agencies that should be represented when information is collected. Circle the letters indicating your choice.
   a. The governor's office
   b. The state employment service

c. The research and development center

d. The client company

e. The agricultural and industrial board

f. The chamber of commerce

g. The research and curriculum unit for vocational-technical education

h. The vocational-technical education complex or junior college

5. List five examples of characteristics which industries require of their employees.

a.

b.

c.

d.

e.

6. Identify from the following list three examples of prerequisite skills that industry will **most likely** require of its employees. Circle the letters indicating your answer.

a. Basic reading, writing, and mechanical skills

b. Managerial skills

c. Specialized skills in operating machines

d. Use of basic tools and equipment

e. Comprehension of industry economics

f. Skills in setting up jigs and fixtures

7. Match the following industrial personnel with the competency they would most likely need. Place the correct letter in the space provided.

a. Supervisor

b. Quality-control specialist

c. Skilled worker

_____ 1. Counsel workers on production efficiency

_____ 2. Assemble an armature stack.

_____ 3. Inspect a shaft diameter.

_____ 4. Calculate employee fringe benefits.

_____ 5. Develop budget for supplies and equipment.

ANSWERS TO SELF-TEST

1. c.
2. b.
3. Any five of the following:
   a. Number of job categories involved
   b. Number of trainees needed in each job category
   c. Personal characteristics required of trainees by the industry
   d. Educational level of trainees
   e. Prerequisite skills required of the trainees
   f. Level of competency required of trainees upon completion of training program
4. b.
   d.
   g.
   i.
5. Any five of the following:
   a. Minimum of a high school diploma or the equivalent
   b. Manual dexterity
   c. Mechanical aptitude
   d. Physical strength
   e. Good eyesight
   f. Ability to work alone and/or in darkness
   g. Ability to work from heights and from peculiar positions
   h. Ability to work in places with high noise levels
   i. Interest in job opportunities available
   j. Cooperativeness
6. a.
   d.
   e.
7. a.–1
   b.–3

c.–2

*Proceed to the next learning activity for practice in collecting framework production and training information.

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LEARNING ACTIVITY II: PRACTICE PERFORMANCE

You will be required to practice collecting framework production and training information. Several subactivities must be completed in the process of collecting the required information. The **Case Study Information** shown in Appendix B must be used as a basis for completing the practice exercises. You must complete the **Manpower Needs Projection Worksheet** shown in Appendix C. You must also complete the **Production and Training Questionnaire** shown in Appendix D. Finally, you must answer the questions presented in Appendix E. You will be evaluating your performance in collecting framework production and training information using the **Performance Checklist** from Appendix A.

I. Read the **Case Study Information** presented in Appendix B. Visualize yourself as making an on-site visit with personnel in this plant. You are getting acquainted with key company personnel, touring the plant, interviewing manufacturing engineers and production supervisors, and observing plant operations.

II. Using the case study information as a guide, and your knowledge of the type industry described, complete the **Manpower Needs Projection Worksheet** in Appendix C. Of course, these projections will be somewhat subjective and judgemental, due to the limitations on available information. However, the industry services leader may be required to perform this task in an actual work situation with little more information than is provided in this module.

III. Imagine yourself making a carefully planned on-site tour of the industry described in the case study information. Complete the **Production and Training Questionnaire** found in Appendix D.

IV. Use the **Performance Checklist** from Appendix A to check your competency in collecting

framework production and training information in the practice situation. For satisfactory performance, all items on the checklist must be checked "yes."

*Completion of the previous learning experiences should have prepared you for collecting framework production and training information in a real work situation. Proceed to the **Check-Out Activity**.

CHECK-OUT ACTIVITY: PERFORMANCE IN REAL WORK SITUATION

The activity which follows is intended to be conducted in an actual work situation. It may be performed without completing the two learning activities, if you already have the necessary knowledge and skills to do so.

You must collect framework production and training information when given the assignment. You must make an appointment with the client company representative, and interview the appropriate industry personnel. Be prepared to discuss and explain in detail the role your industry services program might play in the preparation of prospective employees. It may be necessary to coordinate your visit with personnel from other agencies seeking initial information about the manpower needs of the industry. Your performance will be judged by your instructor or supervisor using a checklist. All items on the **Performance Checklist** (Appendix A) must be rated "yes."

*After completing the **Check-Out Activity**, you may select another module for study. Your instructor or supervisor may be contacted if you have any difficulty in selecting a module.

APPENDIX A

PERFORMANCE CHECKLIST

Collecting framework production and training information.

INSTRUCTIONS: If the performance is satisfactory, write YES in the space provided. If the performance is unsatisfactory, write NO in the space. Each item must be rated "yes" for satisfactory task performance.

1. Were the number of trainees needed in each category ascertained? ☐

2. Was a description of the materials/supplies used in production provided? ☐

3. Was a description of the tools/equipment used in production provided? ☐

4. Were the desired personal characteristics of the prospective employees ascertained? ☐

5. Was the desired educational level of the prospective employees determined? ☐

6. Were the prerequisite skills needed by the prospective employees specified? ☐

7. Was the level of competencies required by the prospective employees established? ☐

8. Was the availability of manpower in the area ascertained? ☐

9. Was the availability of instructional resources clearly specified? ☐

APPENDIX B

CASE STUDY INFORMATION FOR COLLECTING FRAMEWORK PRODUCTION AND TRAINING INFORMATION

A new printing industry will soon locate in your city. The latest technological developments in graphic arts will be applied to print and bind magazines and books. A majority of the jobs require multiple skills. It is estimated that the new plant will initially employ 150 people. Five months of on-the-job practice will probably be required before salable materials can be printed. A thorough assessment of the qualities and skills needed by the workers is paramount.

A list of the jobs and a brief description of the titles are provided below. The industry services leader must use this information to: (1) project the number of employees needed by the industry; (2) identify the personal characteristics required of prospective trainees; (3) identify the basic skills required of prospective trainees; (4) identify the manpower available; and (5) determine the resources required for the training program.

1. **Typists and Proofreaders.** The typists and proofreaders function as part of the prepress group to provide initial information and data for processing.
2. **Photo-composition operators.** The photo-composition operators provide the clean copy, using an optical scanner, a computer, and an editing terminal.
3. **Paste-up and stripping technicians.** Paste-up and stripping technicians cut and paste the copy in the format desired by the customer. They use knives, T-squares, and triangles in paste-up and stripping activities.
4. **Camera operators.** The camera operators convert line and half-tone elements, color art, and transparencies to film. They enlarge and reduce copy to the size page layout desired by the customer.
5. **Opaquers.** The opaquers use a paint brush and paint to opaque holes on film so that light will not penetrate the film when plates are made.
6. **Platemakers.** The platemakers operate automatic machines which make an impression on a thin flat piece of metal. This plate with the image is used by the press operator to print the final product.

7. **Proofers.** The proofers prepare proofs of the copy for the customer.
8. **Press operators and press helpers.** The press operators and their helpers operate large multicolor printing presses.
9. **Finishing machine operators and helpers.** The finishing machine operators and their helpers gather, bind, trim, and label the finished product for mailing.

APPENDIX C

MANPOWER NEEDS PROJECTION WORKSHEET

Certainty	Required	Available	Net needs
Short-range 0-3 months			
Intermediate range 3-6 months			
Long-range 6 months–one year			
Other Projections Uncertainty			

APPENDIX D

PRODUCTION AND TRAINING QUESTIONNAIRE

Client Company Name _____

_____

Industry Services Leader _____

_____

Client Company Representative(s)

_____

_____

Appointment date _____

---

1. What is the nature of the production tasks?

2. What type products are manufactured by the industry?

3. What job classifications will be used in the new plant?

4. Are products to be manufactured after training presently being made in the plant? If yes, will identical equipment be used?

5. Will the industry services leader have access to personnel and production procedures employed in the plant?

6. What materials/supplies are needed to perform the production tasks? Are there special grades or other specifications about the material that should be known? How are materials supplied?

7. What tools are required?

8. What equipment is required? Is it of a general production nature, or is it specialized and unique to the plant operation?

9. What amount of time has been required to train operators in the past?

10. How have operators been trained in the past?

11. Does the company presently have a training function?

12. Who within the organization understands the total operating procedures?

13. What are some example prerequisite skills required by prospective employees? Identify by specific jobs.

14. What are some example employee personal characteristics required by the industry? Identify by specific jobs.

15. What are some example levels of competencies required by skilled employees? Identify by specific jobs.

16. What qualifications must instructors for the training program possess? From what source will the instructors be recruited?

17. What type instructional materials will be needed for the training program? Are these materials currently available?

18. To what extent is detailed task analysis information already available from the industry?

LIST OF INDUSTRY SERVICES LEADERSHIP DEVELOPMENT MODULES

I. **Orientation to Industry Services**

- A. Introduction to Industry Services
- B. Industry Services Leadership Development Program: Guide for Using the Self-Paced Instructional Modules

II. **Establishing Contacts and Relationships**

- A. Speaking to Industrial and Community Groups
- B. Writing Articles for News Media
- C. Identifying Functions of Agencies Involved in Industry Services
- D. Developing a Brochure for Industry Services

III. **Obtaining Agreements**

- A. Developing Training Agreements
- B. Developing a Lead-time Schedule
- C. Interpreting Legislation Related to Industry Services

IV. **Identifying Training Needs**

- A. Collecting Framework Production and Training Information
- B. Selecting Types of Training Programs
- C. Preparing a Budget for an Industry Services Project

V. **Acquiring Resources**

- A. Selecting Instructors for Industry Services
- B. Securing a Training Site
- C. Securing Training Equipment, Tools, and Supplies

VI. **Training Instructors for Industry Services**

Training Instructors for Industry Services

VII. **Preparing for Training**

- A. Adapting the Training Site to Training Needs
- B. Evaluating Safety Conditions at Training Sites
- C. Announcing the Opening of a Training Program

VIII. **Preparing Training Materials**

- A. Conducting a Task Analysis
- B. Developing Performance Objectives
- C. Determining Types of Instructional Methods and Media
- D. Developing Performance Tests
- E. Developing Training Manuals
- F. Preparing Videotapes for an Industry Services Program
- G. Setting Up Learning Centers for Industry Services Programs

IX. **Selecting Candidates**

Developing a Plan for Testing and Counseling Applicants for a Training Program

X. **Monitoring Training Programs**

- A. Assisting in Providing Pre-Employment and In-Plant Training
- B. Developing a Procedure for Keeping Participating Agencies Informed About Training Program Activities
- C. Monitoring Training Programs for Progress and Expenditures

XI. **Closing Training Programs**

Closing a Training Program

XII. **Placing Program Participants**

Developing a Plan for Placing Graduates of a Pre-Employment Training Program

XIII. **Evaluating Industry Services Programs**

Evaluating Industry Services Programs

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